

# CRAFTING A HISTORIC PRESERVATION PROGRAM: A Checklist for Success



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*Preservation Matters!*  
San Joaquin County Historical Museum  
March 20, 2008



# Is this Happening in Your Community?



Inappropriate alterations to buildings?

Is this  
Happening in  
Your  
Community?

Clutter in the  
streetscapes?



# Is this Happening in Your Community?



Have you ever had the experience of driving down a road and realizing that what once was a farm. . .

had turned into a strip mall?





# Is this Happening in your Community?

Construction of out-of-character houses and businesses?



# The Value of Historic Preservation to the Community

- Economic
- Aesthetic
- Social - Quality of Life



# Economic Values



- Heritage Tourism
- Rehabilitation & Adaptive Reuse
- Resource conservation
- Property Values
- Revitalized downtowns
- Incubate locally-owned small businesses

# Aesthetic Values



vs



- Community character vs. Generica
- Promotes sense of time and place
- Connects the Past with the Present
- Connects people of today with those who have come before



# Quality of Life

## Preservation Promotes

- Mixed use neighborhoods
- Pedestrian orientation
- Sense of community
- Decreased crime rates in historic districts
- Preserve open space
- Save agricultural lands



Bungalow Heaven

# Early Preservation Efforts



Sutter's Fort

# Changing Approaches to Preservation

- City of Charleston, "Old and Historic District," 1931
  - No changes could be made to exterior architectural features that were subject to view from a public street or way.



# Recent Preservation Direction



Alkali Flat Historic District,  
Sacramento



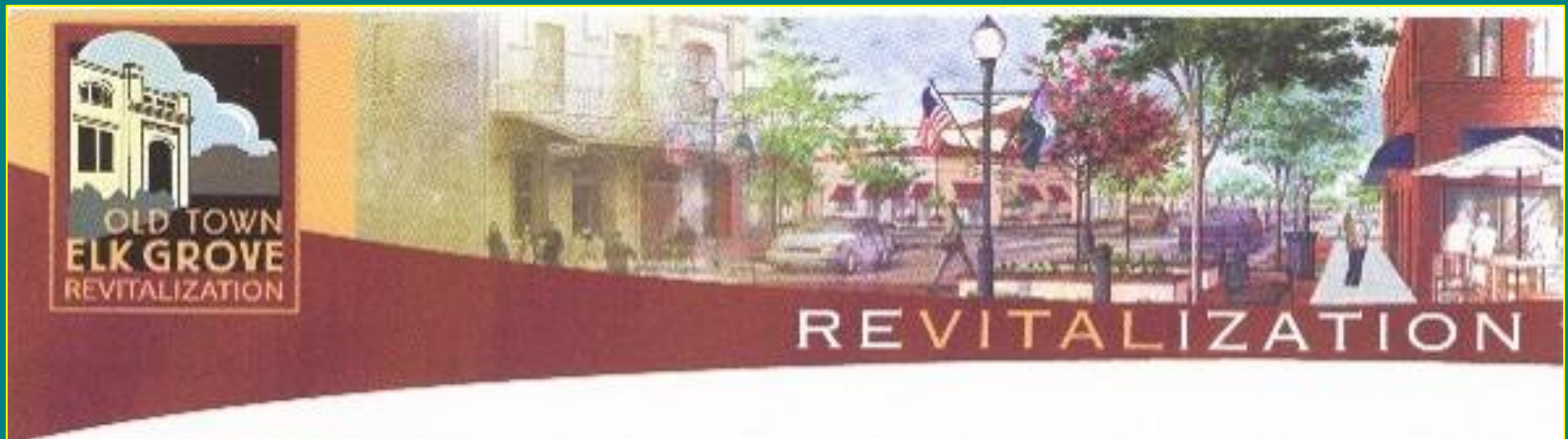
# Recent Preservation Direction



Commercial Districts and Main Streets  
(Grass Valley)

# More Changes in Preservation Direction

- Tied to land use planning
- Integration of historic preservation into city and county planning departments



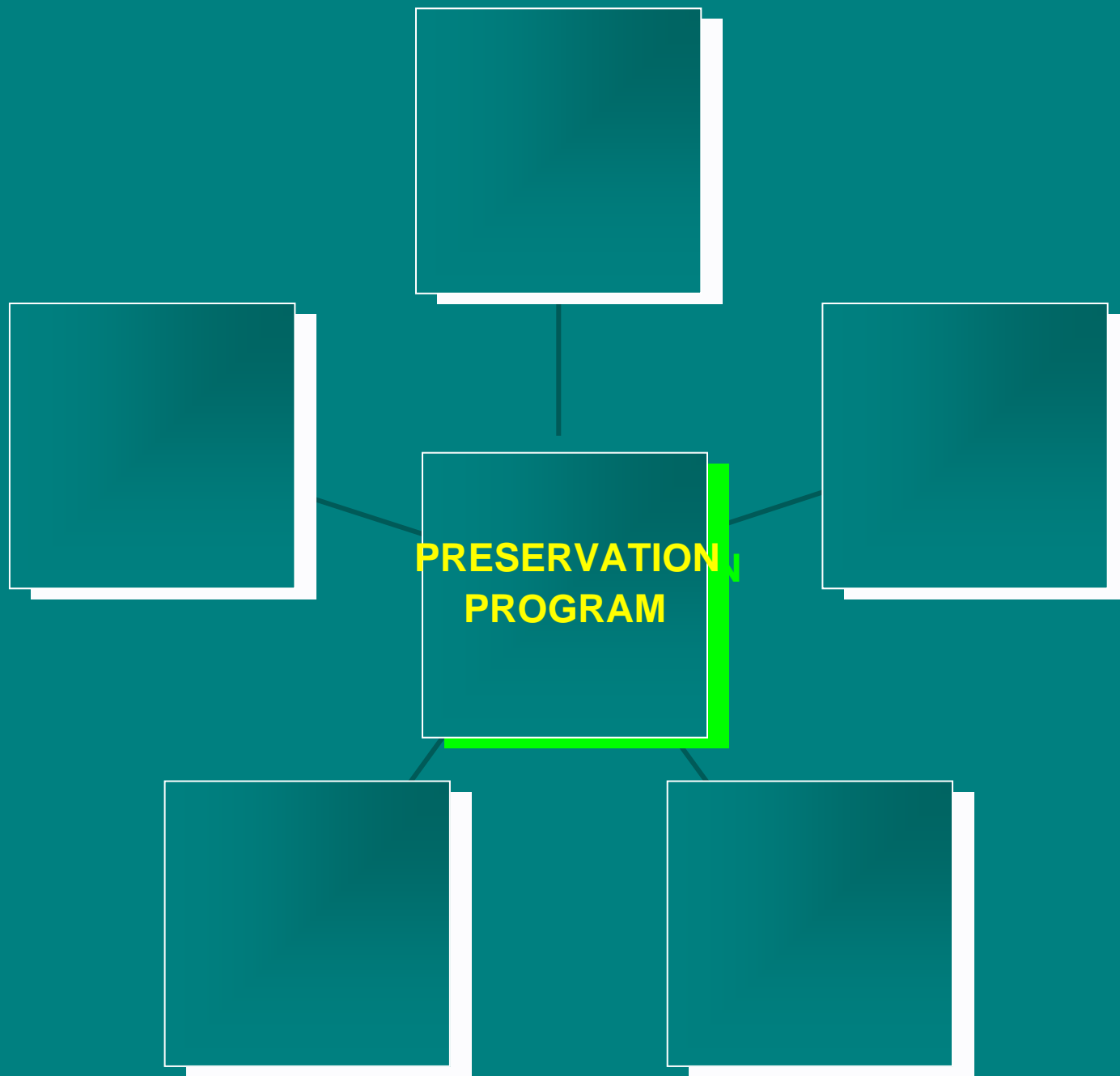
# More Changes in Preservation Direction



- Shift of program responsibility from historical societies and museums to local government



- Historical societies & other organizations remain strong & important advocates

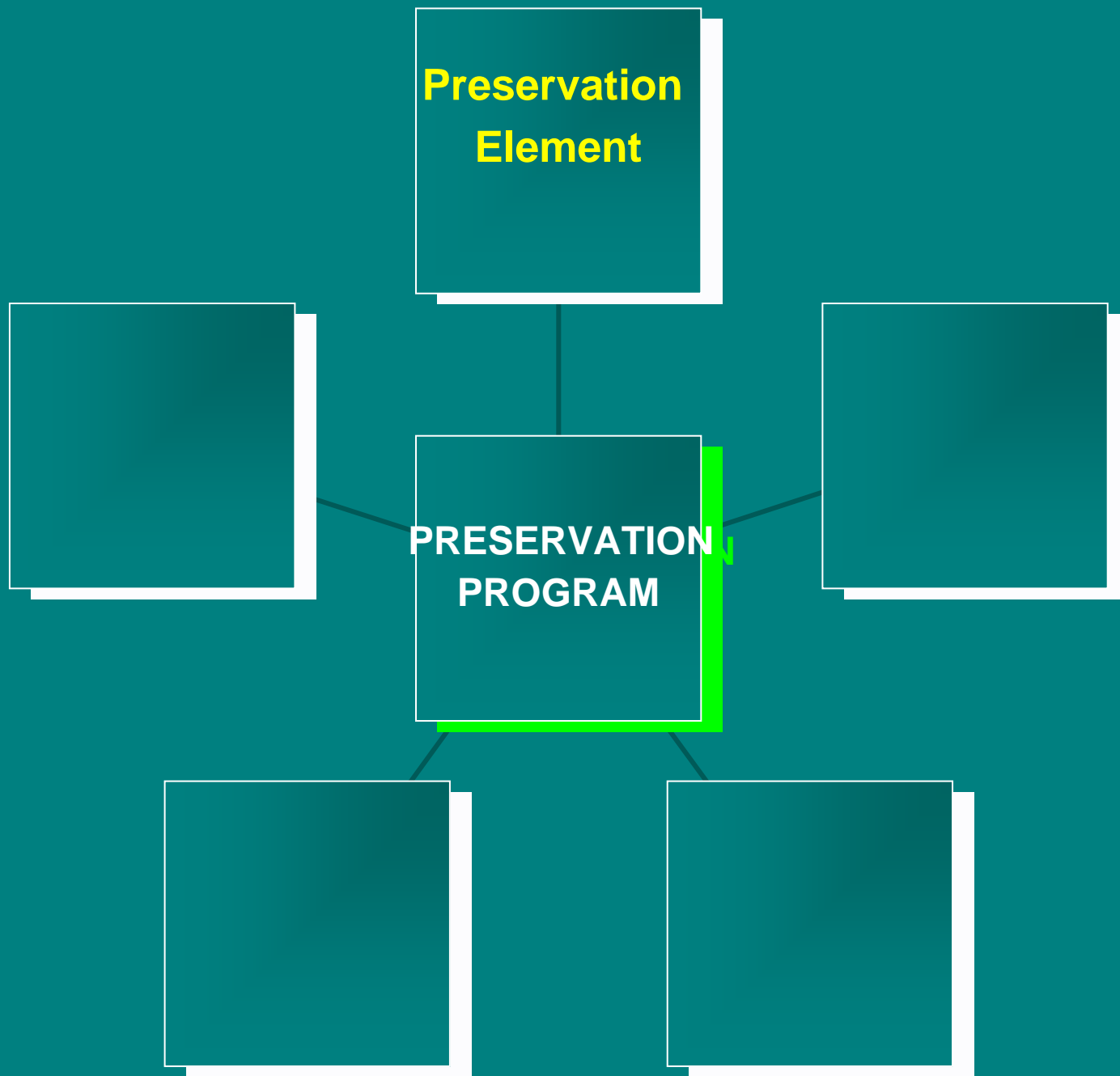




# Building a Comprehensive Preservation Program



- Historic Preservation Element
- Ordinance/Regulations Guidelines
- Surveys and Contexts
- Economic Benefits & Incentives
- Education, Technical Assistance & Outreach Programs



# ✓ Historic Preservation Element of the General Plan

- General Plans represent the only formal, unified overview of the quality of life in a community
- General Plans are the place to link historic preservation into land use planning



# Historic Preservation Element

## Elk Grove

- Historic Resource Policies
  - Encourage the preservation and enhancement of existing historical and archaeological resources in the City
    - Adopt a Historic Preservation Ordinance
    - Establish a Historic Preservation Committee
    - Develop and update a comprehensive historic resource inventory



# Historic Preservation Element

## Grass Valley

- Historical Goal and Objectives
  - Preservation of buildings of historic and/or architectural merit
  - Delineate and describe Grass Valley's neighborhoods
- Historical Implementation Actions and Strategies
  - Expand the "historical district" to include both sides of West main Street

# Historic Preservation Element

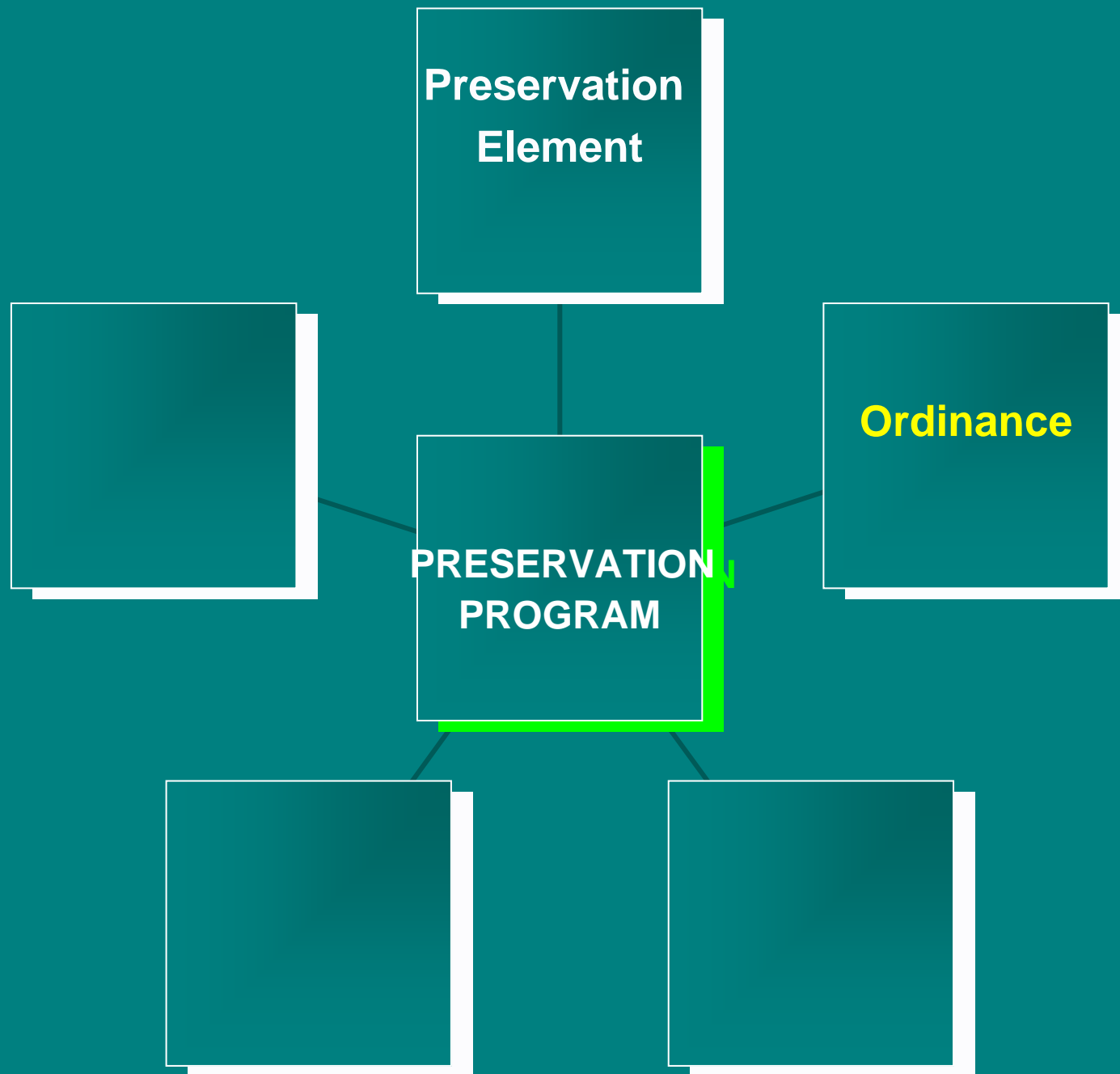
Link historic preservation to other goals  
and policies

- Redlands [affordable housing]
  - Coordinate preservation of historical resources with policies designed to preserve affordable housing
- Santa Monica [cultural diversity]
  - Ensure that historic preservation planning is culturally inclusive and reflective of the unique background and diversity of neighborhoods in the City

# Historic Preservation Element

## Link historic preservation to other goals and policies

- Napa [transportation]
  - When planning transportation route, the city shall seek routes and improvements that recognize and protect historic neighborhoods
- Claremont [integration into all actions]
  - The City shall incorporate the protection of architectural, historical and archaeological resources in the immediate and long range plan process of both public and private actions throughout the city.





# Adopting a Preservation Ordinance

“The preservation ordinance is nothing more than **local** legislation enacted to protect buildings and neighborhoods from destruction or insensitive rehabilitation. . .”

Pratt Cassity, *Maintaining Community Character: How to Establish a Local Historic District*, NTHP, 2002





# Things to Think About!

## The ordinance should fit your community

- What is the purpose of the ordinance?
- What resources should be protected?
- How best to protect them?
- How will ordinance be administered and enforced?



# A Preservation Ordinance Does

- Provide a **municipal policy** for protection of historic properties
- Establish an objective and **democratic process** for designating-due process
- **Protect the integrity** of designated historic properties within a design review requirement
- Authorize **design guidelines** for new development within historic districts
- Stabilize declining neighborhoods and protect and **enhance property values**

# Preservation Ordinance Does Not

- Require that historic properties be open for tours
- Restrict the sale of the property
- Require restoration of the property
- Require approval of interior changes or alterations
- Prevent new construction within historic areas
- Require approval for ordinary repair or maintenance

# KEY ELEMENTS

- Purpose
- Enabling Authority
- Preservation Commission
- Designation Procedures & Criteria
- Actions subject to Review
- Economic Effects
- Incentives



- Enforcement
- Appeals
- Definitions
- Severability



# Establishment of the Preservation Commission



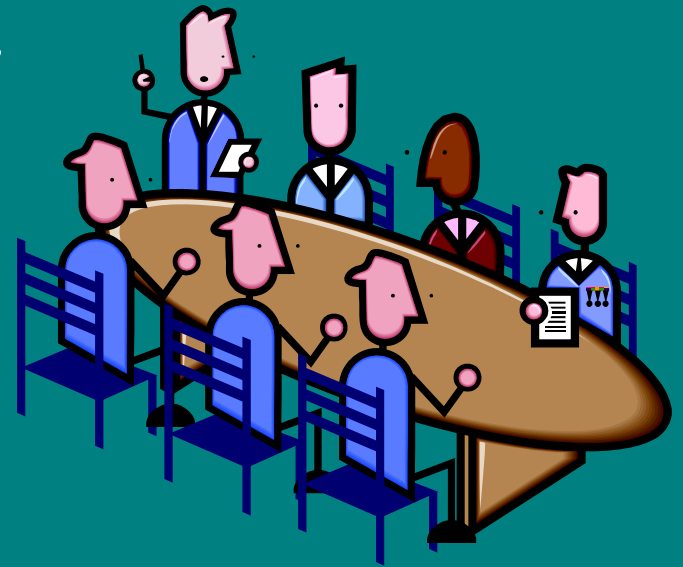
- Who administers and enforces preservation ordinance?
- Composition of Commission
  - Who appoints?
  - Term?
  - Professional qualifications?



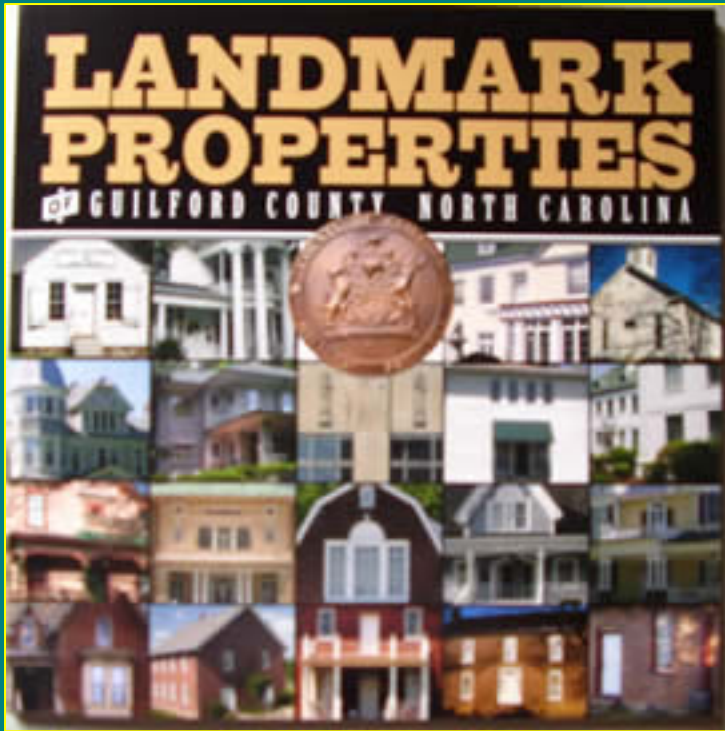
# Establishment of the Preservation Commission

## Scope of Powers

- Maintain local inventory
- Designation
- Review and Comment
- Make recommendations
- Incentives
- Public education
- Relationship with Planning Commission, City Council, and other agencies



# Establish Historical Resources Criteria



- Provide clear criteria standards
- Define key terms
- Use local criteria that match National Register and California Register to facilitate CEQA/Section 106 reviews
- Think in terms of historic zoning

# Designating Historical Resources

## Procedures - Notice & Hearings

- Notice to owner and interested parties
- Public hearing
- Written findings
- Owner consent/objection may unlawfully delegate local government authority



# Actions Subject to Review Procedures & Criteria

## Appropriate Level & Amount of Review

- Demolitions
  - Deny ?
  - Delay ?
- Alterations
  - Deny ?
  - Delay ?
- New construction in historic areas
  - Deny ?
  - Delay ?



# Actions Subject to Review

## Adopt Appropriate Review Standards

- Standards need to be
  - Defined
  - Reflect local preservation goals
  - Provide for due process
  - Efficient
  - Fair
  - Limit administrative discretion
  - Result in predictable decisions



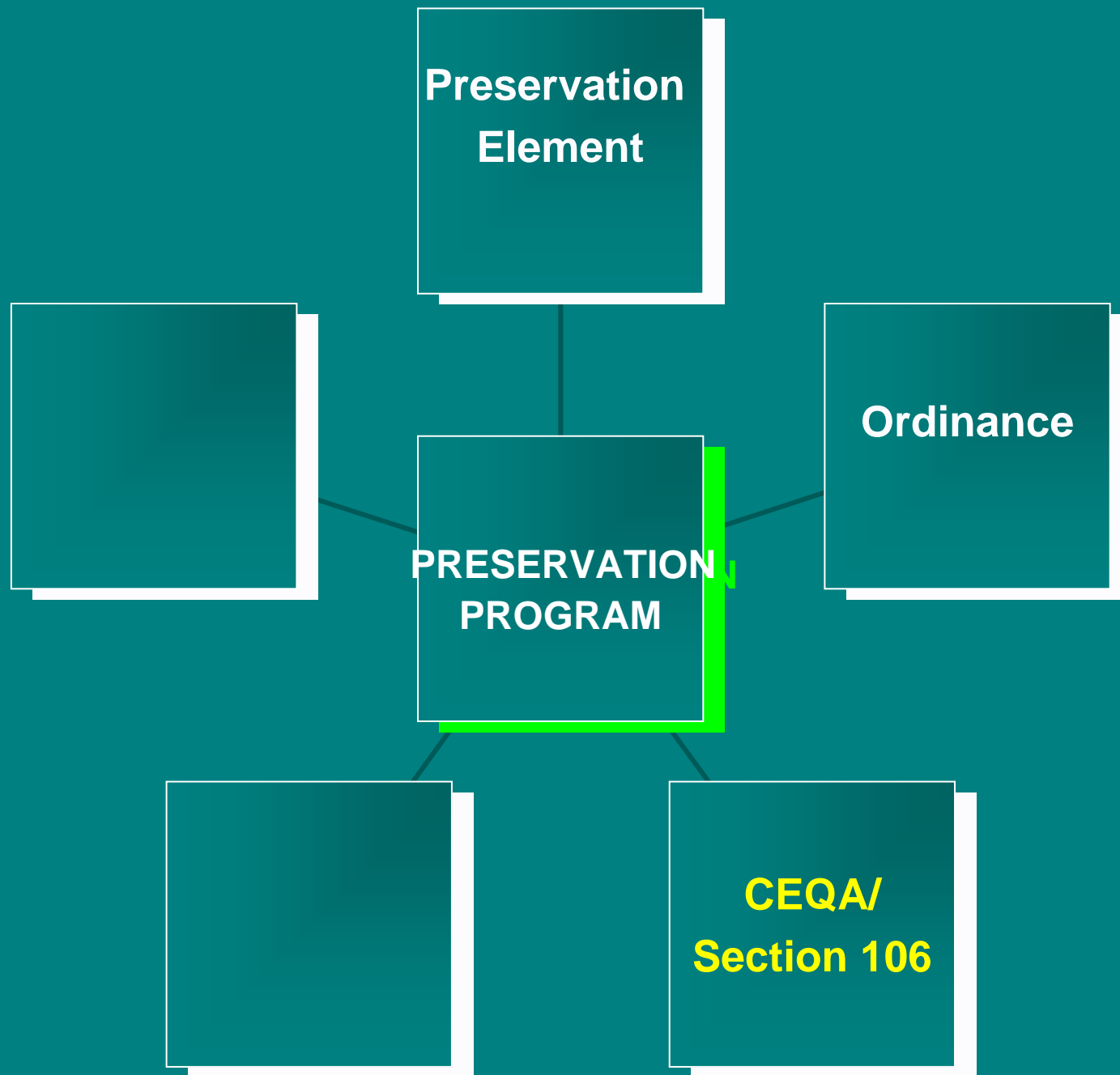




# Incentives



- Mills Act
- Encourage federal tax credits
- Apply State Historic Building Code
- Waiver permit fees
- Exceptions to underlying zoning standards
- Preservation easements
- Official recognition/Awards





# Regulatory Coordination

- Adopt a historic preservation ordinance and local CEQA procedures/processes that are coordinated.
- Use common definitions.
- Develop local designation criteria that are modeled on the Cal Register/National Register approach.
- Use the Secretary of the Interior's Standards for Rehabilitation.
- Promotes streamlining.

# California Environmental Quality Act

- Every public agency, including local governments and districts, are responsible for complying with CEQA.
- Historical resources are part of the environment
- Effects to historical resources must be determined

# Section 106 of the National Historic Preservation Act

- Consultation process
- Requires federal agencies to identify historic properties potentially affected by the undertaking, assess its effects, and seek ways to avoid, minimize or mitigate adverse effects.



# Section 106 of the National Historic Preservation Act

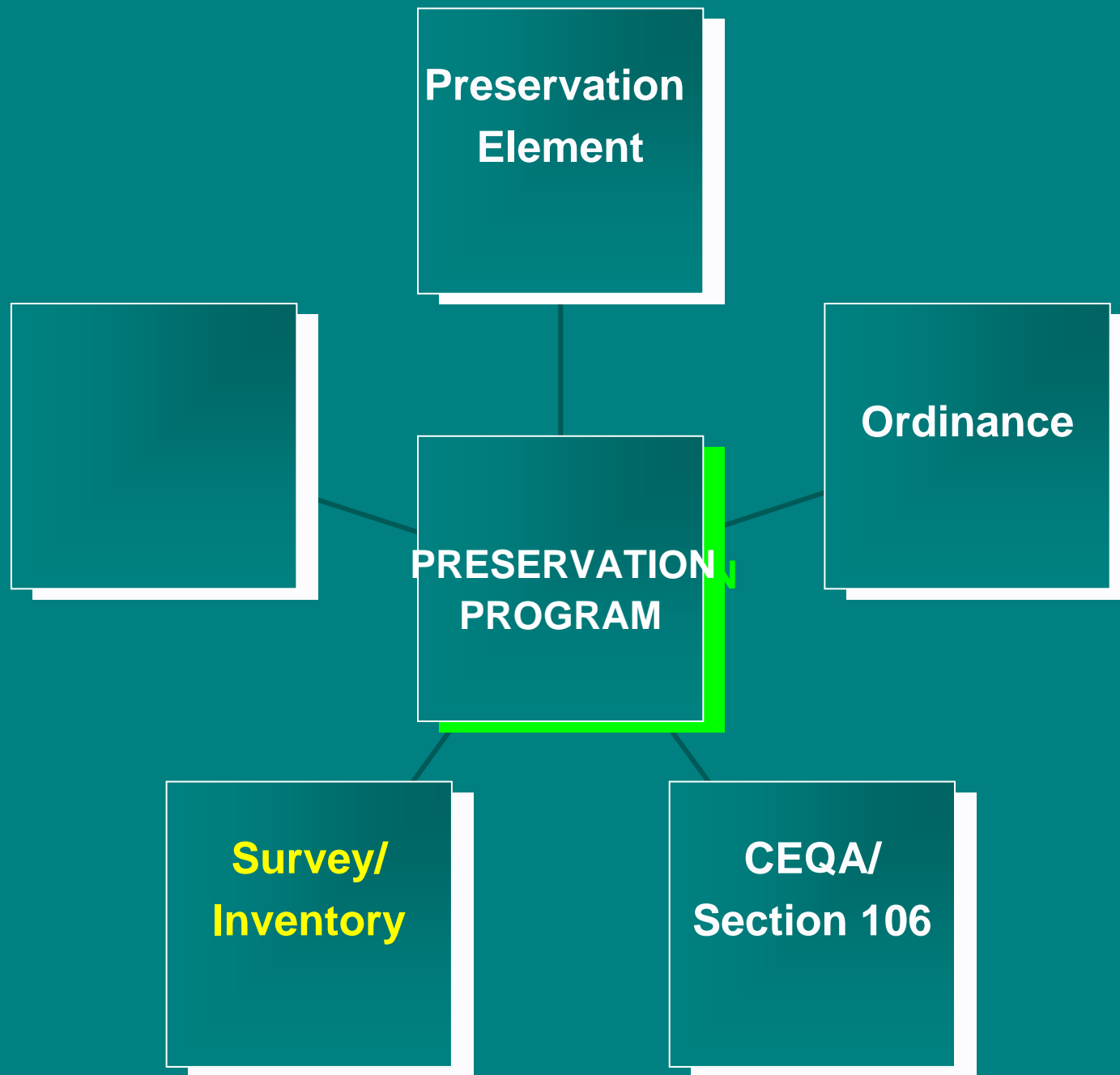
A representative of a local government that has jurisdiction over the area in which the effects of an undertaking may occur is entitled to participate as a consulting party.



# Section 106 of the National Historic Preservation Act



In many cases where projects are funded by HUD (often housing or community development projects), the local government takes over the role of the lead federal agency.





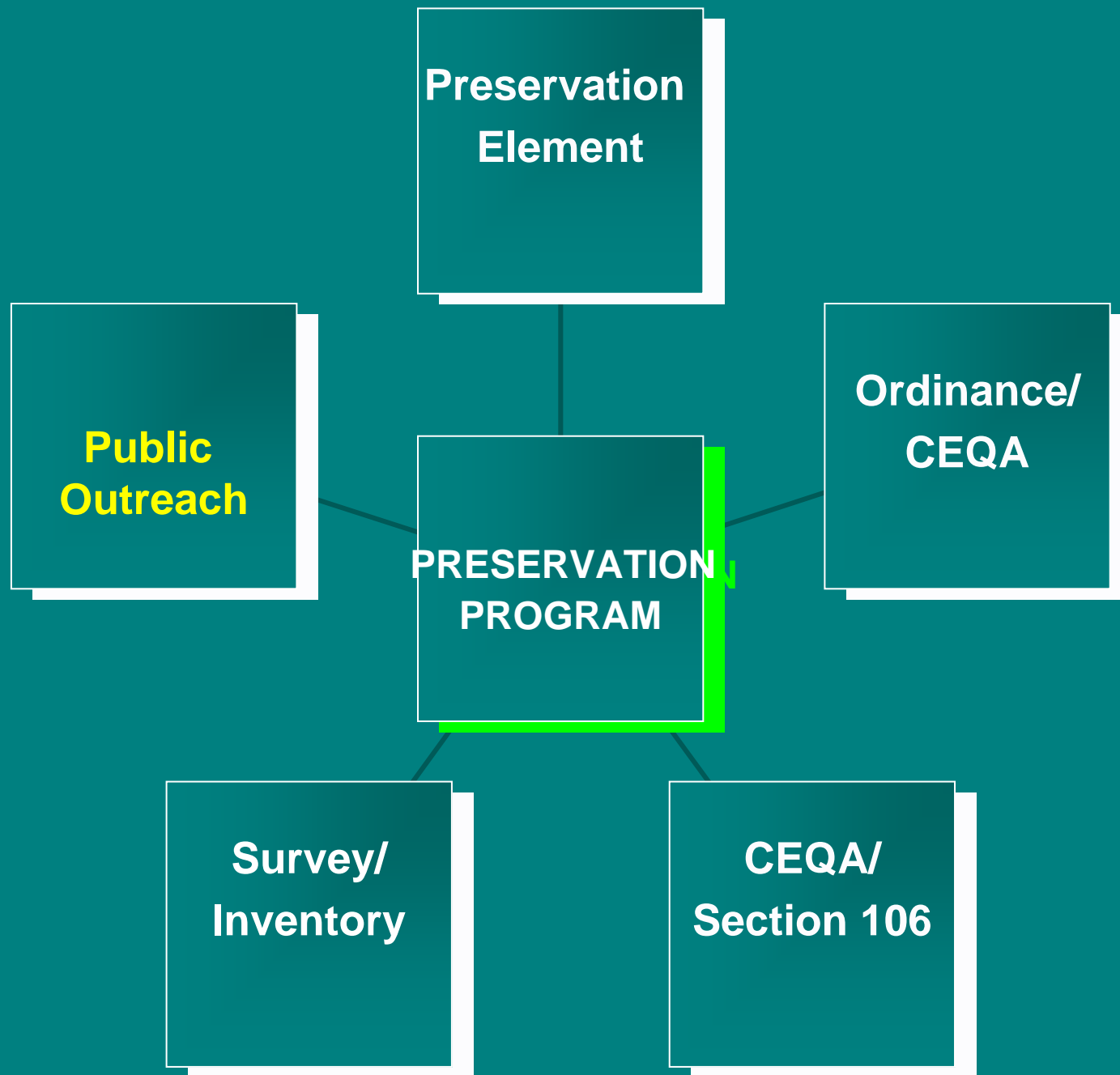
Survey is the **Foundation** upon which preservation planning is built.



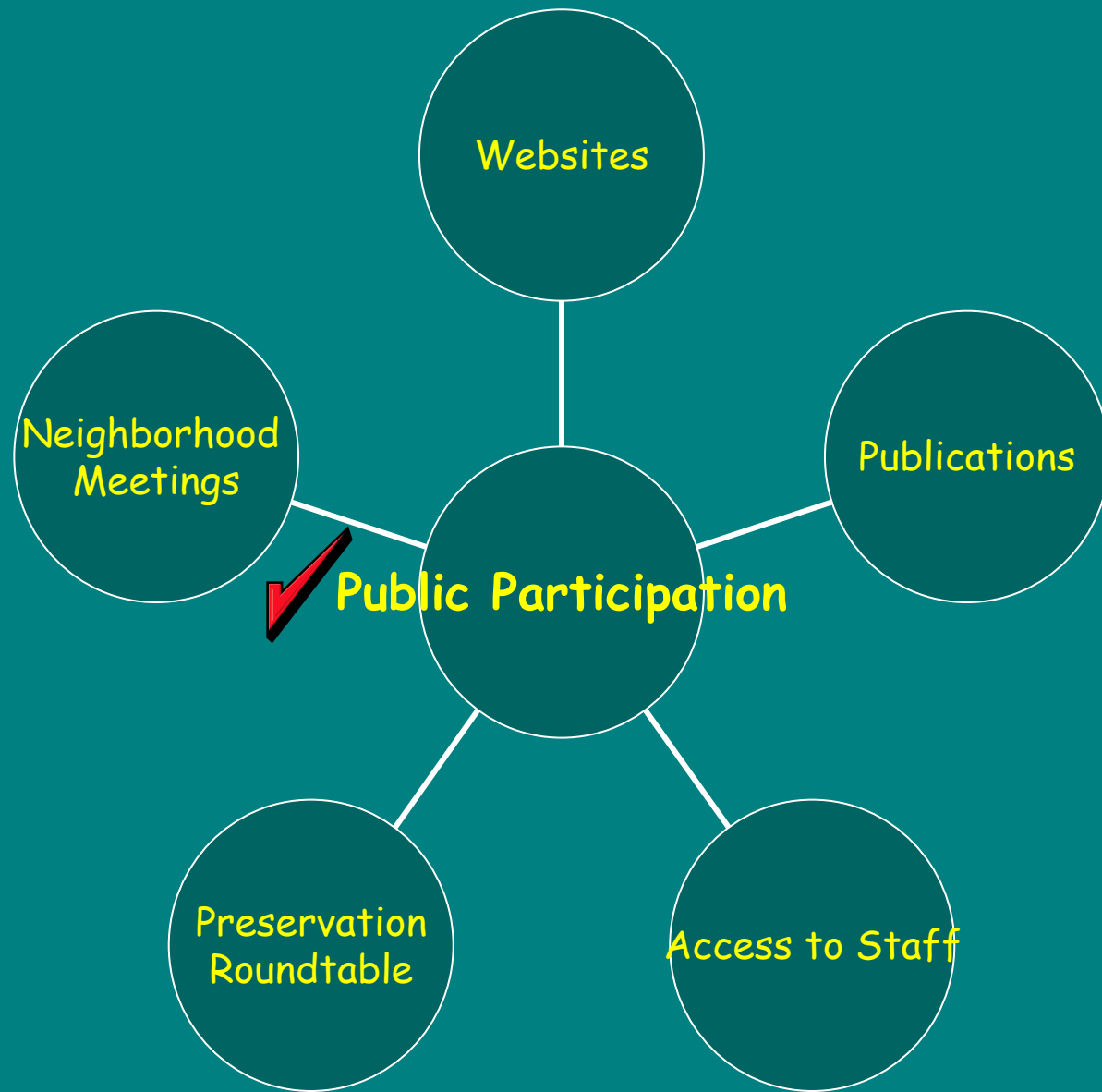
# Survey/Inventory: A Multi-Purpose Tool



- Data collection
- Provides the information to identify and prioritize preservation goals
- Tells us **where** properties are, **what** they are, and **whether** they are historic properties
- Assists in identification of resources worthy of further recognition or designation
- Offers predictability by alerting ahead of time how properties will be treated in regulatory procedures and code enforcement







# The Checklist

- ✓ Preservation Element
- ✓ Preservation Ordinance
- ✓ Commission
- ✓ CEQA Procedures/Section 106
- ✓ Survey/Inventory
- ✓ Incentives
- ✓ Public Participation



[www.ohp.parks.ca.gov](http://www.ohp.parks.ca.gov)

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TRAINING and WORKSHOPS

PRESENTATIONS FROM PAST WORKSHOPS

UPCOMING OHP WORKSHOPS

PRESERVATION MATTERS!

When: Thursday, March 20, 3:00-5:30 p.m.  
Where: San Joaquin County Museum  
11793 Micke Grove Road

Local intranet

Inbox - Microsoft Out... LodWorkshopHPRasic... Registration Photos TRAINING and WORK... 10:50 AM

# For more information about General Plans and Historic Preservation Elements:

- State of California, Governor's Office of Planning & Research, *General Plan Guidelines*, Chapter 6: Optional Elements (2003),  
[http://www.opr.ca.gov/planning/publications/General\\_Plan\\_Guidelines\\_2003.pdf](http://www.opr.ca.gov/planning/publications/General_Plan_Guidelines_2003.pdf)
- State of California, Governor's Office of Planning & Research, *General Plan Guidelines Update*,  
<http://www.opr.ca.gov/index.php?a=planning/gpg.html>

# For More Information about Historic Preservation Ordinances

- California Office of Historic Preservation, Technical Assistance Series 14, *Drafting Effective Historic Preservation Ordinances*, revised June 2005, [http://www.parks.ca.gov/pages/1069/files/14\\_hp\\_or\\_dinances.pdf](http://www.parks.ca.gov/pages/1069/files/14_hp_or_dinances.pdf)
- Samples of local historic preservation ordinances, [http://www.parks.ca.gov/?page\\_id=1243](http://www.parks.ca.gov/?page_id=1243)

# For More Information About CEQA

- CEQA Guidelines  
<http://ceres.ca.gov/ceqa/guidelines>
- General information on OHP website,  
[http://www.parks.ca.gov/?page\\_id=21721](http://www.parks.ca.gov/?page_id=21721)
- CEQA database  
[www.ceqanet.ca.gov](http://www.ceqanet.ca.gov)

# For More Information About Section 106

- Section 106 regulations and guidance,  
<http://www.achp.gov/regs-rev04.pdf>



# For Additional Information about Surveys

- National Register Bulletin, *Guidelines for Local Surveys: A Basis for Preservation Planning*,  
<http://www.nps.gov/history/nr/publications/bulletins/nrb24>
- Archeology & Historic Preservation: Secretary of the Interior's Standards & Guidelines for Preservation Planning, Identification, Evaluation, Registration, & Preservation Terminology,  
[http://www.nps.gov/history/local-law/arch\\_stnds\\_0.htm](http://www.nps.gov/history/local-law/arch_stnds_0.htm)



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